adminsoft

Adminsoft Accounts User Guide

SALES PROSPECTING

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Adminsoft Accounts - Sales Prospecting

INTRODUCTION

The Sales Prospecting module is all about keeping track of your sales prospects, and generating estimates. It goes hand in hand with the other module: Sales Order Processing. There is a separate guide for Sales Order Processing.

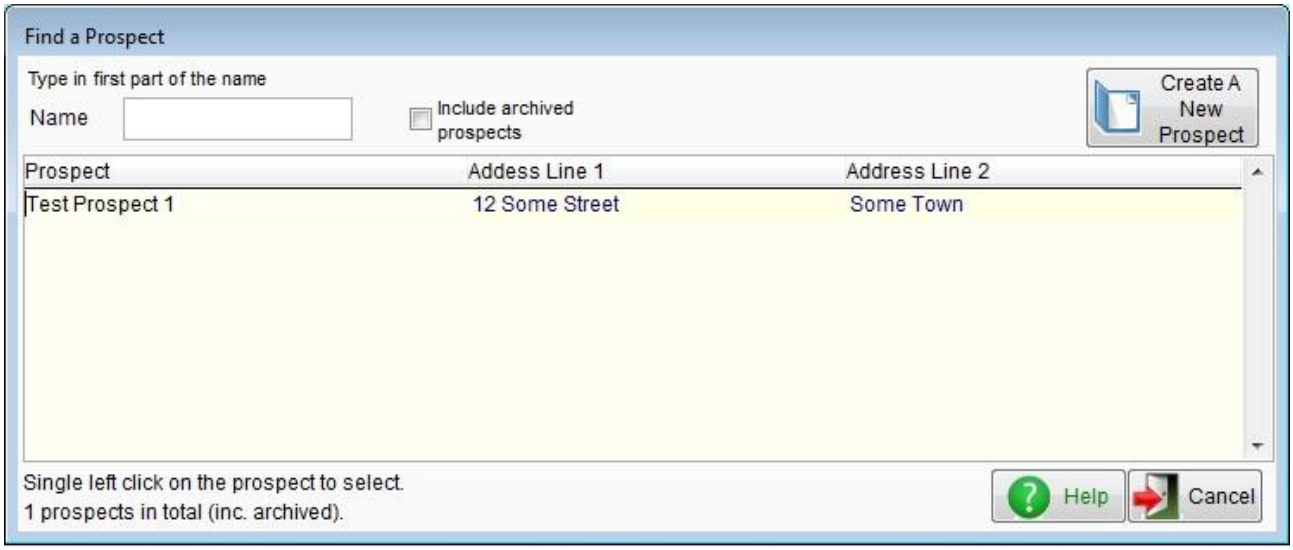
Each sales prospect has their own record. That record will contain their basic details such as postal address, web URL, etc. It can also contain a diary, list of contact names and details of each, list of estimates created, and a list of any orders/jobs (these are handled in Sales Order Processing). As well as containing details of the usual contact details, such as postal address, telephone numbers, and email address, it also contains a section called 'Alternative Contact', which allows you to enter details for contact via Facebook, Twitter, WhatsApp, etc.

As this module is a tool to help generate sales, it also contains options for mail and email shots. One option can be used to build up an email list from data held in the prospect records, the other option allows you to import data lists for emailing. Two things to note here. This software is PC based, and uses your email SMTP details to send out email. So, in practice email shots are limited to just a few hundred emails each time. If you need to send out thousands, then you need to use on of the on-line email shot service providers. The second thing you need to be aware of, is the law in your country may prohibit you from sending out email shots, or may place restrictions on who you can email. The options to send out email shots are detailed at the end of this guide.

PROSPECT DETAILS

One of the main jobs of the Sales Prospecting module is to create and maintain the details of sales prospects. A prospect record must exist before any estimates can be created, as all estimates will relate to a prospect record.

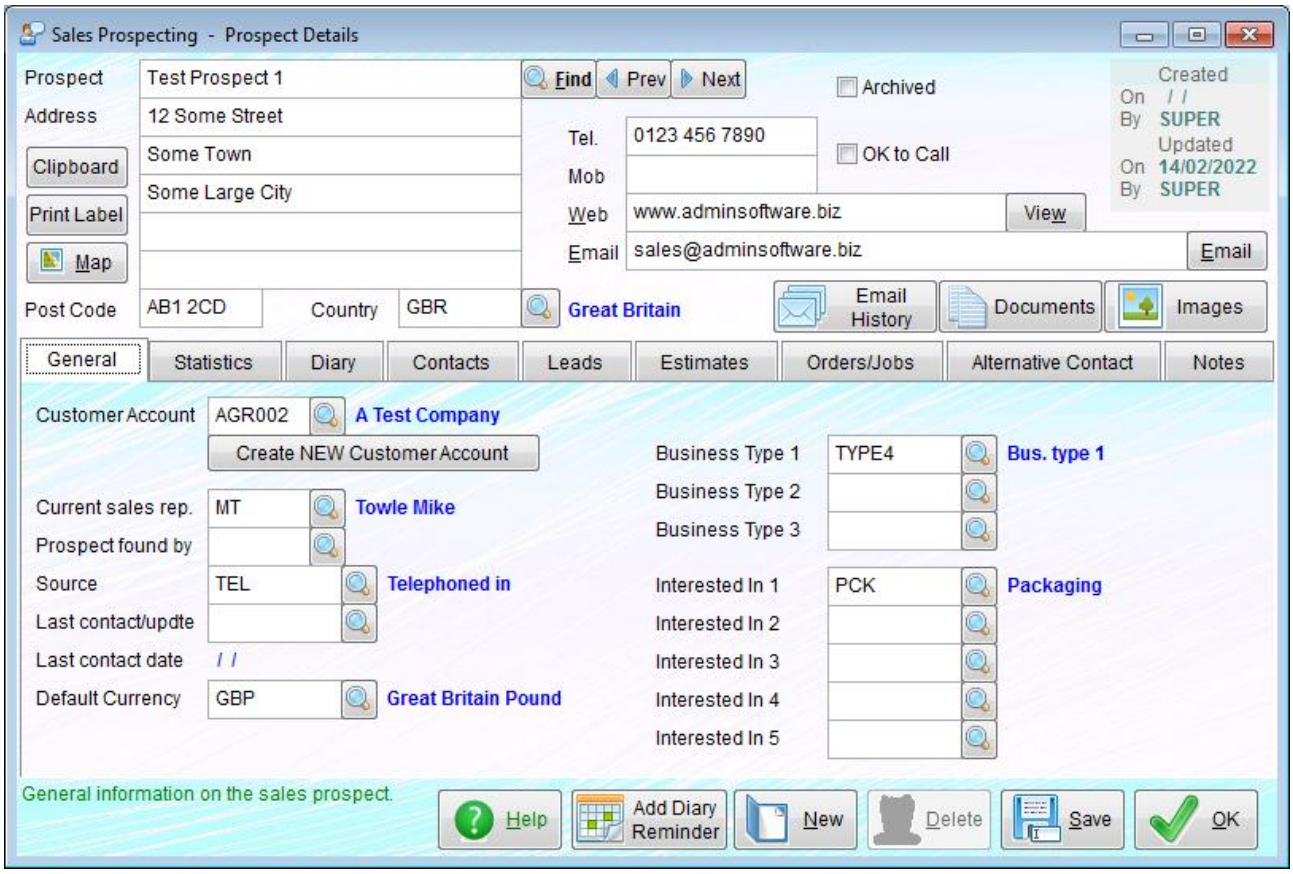
To create a new prospect record, or to view/edit the details of an existing record, select Sales Prospecting on the top menu bar, then select the option 'Prospect Details'. The following window will appear:



To create a new sales prospect, click the 'Create A New Prospect' button in the top righthand corner. To select an existing prospect, start typing the prospect name into the 'Name' input field. The list of

prospects below (there's only one prospect in our test data) will change as you type. Once you see the prospect record you require single left click on it. If you're struggling to find a prospect, you can use the 'Search for a Prospect' option in the Sales Prospecting drop down menu.

In the 'Find a Prospect' window (shown above) we have selected the prospect 'Test Prospect 1'. The following window then appears:



As you can see, the information displayed in the top half of the window is fairly standard, typical of a customer or supplier account details window. In the lower half of the window, we have information that is much more specific to a sales prospect. Unlike an account, a prospect does not have an account number or any kind of unique reference.

A prospect can be linked to a customer account. But this is optional. However, it is necessary should you wish to create an order/job for the prospect.

'**Clipboard**' will put a copy of the prospects name and address onto the Windows clipboard. This will allow you to paste (Ctrl-V) into a letter, email, or some other document in another application.

'Print Label' will print the prospects name and address out as a label. The size of the label does need setting up before it can be used for the first time. There is an option 'Setup Labels' in the **'Print Label'** option. The settings can be changed at any time.

'**Map**' will start up your default internet browser, and using Google maps will display the location of the prospect. To do this, it does require a post code/ZIP code in the appropriate input field of the address.

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'**Archived**' allow you to specify if a prospect should be archived. When archived, it will not usually appear in any general lists of prospects. Useful for removing prospect records that you're unlikely to need again, without actually deleting. The prospect record can be un-archived at any time.

'OK to Call' is a simple indicator stating whether a prospect can/should be called or not. This option doesn't do anything or prevent anything, it's just provided for your information.

'Email History' will display a list of all emails sent from within Adminsoft Accounts to the prospect.

'**Documents**' allows you to attach documents to the prospect record. This may be copies of documents sent to the prospect, legal documents, etc.

'**Images**' allows you to attach image files to the prospect record. It also allows you to scan in documents. So, for example any letters received form the prospect could be scanned in and stored using this option.

General

In here, you can select a customer account to link to the prospect record. Enter the account code, or click on the find button just to the righthand side of the **'Customer Account'** input field. It is possible to link an account to two or more prospects. If a new customer account is required, you can click the **'Create NEW Customer Account'** button, provided you have the authority to do so (if not, the button will be greyed out).

'**Source**' allows you to specify the source of the prospect. An enquiry from the prospect may have been generated via an advertising campaign, an exhibition or some other event, or some other way. You can set these up in Setup -> Sales Prospecting and Processing. It can be a useful tool for analysing where your business is coming from. Use of this input field is of course optional.

'Business Type' You can specify up to three types of business that categorise what the prospects business does. They are coded, the codes are set up in Setup -> Sales Prospecting and Processing. These are optimal.

'Interested In' allows you to list up to five types of product/service the prospect may be interested in. These are coded, and are setup in Setup -> Sales Prospecting and Processing.

Statistics

This displays some basic statistics about the prospect. However, these are not maintained automatically. You need to click the **'Update Statistics'** button in order to bring them up to date. The last date and time of the last update is displayed.

Diary

In here you can maintain details of every contact made with the prospect. There is no practical limit to the number of diary entries. Use of this option is recommended, as the details of each contact are

then available to anyone using the system who needs to contact the prospect.

Contacts

This allows you to maintain a list of people who work or are connected in some way with the prospect organization. Each contact can have their own contact details, including address, telephone numbers, email address, and other forms of contact such as Facebook, Messenger, etc.

Leads

A lead allows you to build a collection of estimates that all relate to each other in some way. You don't need to create a lead in order to create an estimate, but it can often be beneficial to do so. If you create some estimates that relate to each other, perhaps they are for the same product but for different quantities or some other minor variation, you can add them together as one lead. Leads can be useful where you are generating a lot of estimates for one customer.

Estimates

This option will list any estimates created for the prospect, and allow new estimates to be created (estimates can also be created from within a lead, or attached to a lead later on).

Note: estimates can also be produced from a customer account, but these are a different type of estimate (they look much like an invoice), and can only be seen from the A/c Receivable Ledger (Sales Ledger), even if the prospect is linked to the account. Also, no estimates created in Sales Prospecting can be seen within the A/c Receivable Ledger (Sales Ledger).

From within Sales Prospecting there are two types of estimate: a multi product/multi quantity type, and a single product/single quantity type. The latter type of estimate is the simplest. It's designed to handle one main product, and one quantity. If you required multiple quantities and wanted to use this type of estimate, you would have to create multiple estimates. You could then link them together in a lead. However, if multiple quantities and/or multiple products are required, the '**Multi**' type of estimate is the best. It allows product images and descriptions (in HTML) to be added, and so allows nicer looking estimates to be produced in print/PDF or HTML format.

Orders/Jobs

In Sales Prospecting and Sales Order Processing an order is the same as a job, there is no difference. The terms can be used Interchangeably, and sometimes are. Where space permits, they're referred to as an 'Order/Job', if space is tight, they may just be referred to as a 'Job'.

Estimates created in Sales Prospecting can be turned into an order/job. Regardless of the type of estimate, there is only one type of order/job. The order/job will inherit the items in the estimate to be charged to the customer, and the associated costs. Once the order/job is created, these can be edited, deleted, and/or extra charges and costs added. This can happen though out the life of the order/job, right up until the order/job status is set to 'Complete'. Even then, costs can still be edited, because in real life they can often change long after an order/job has been finished and delivered.

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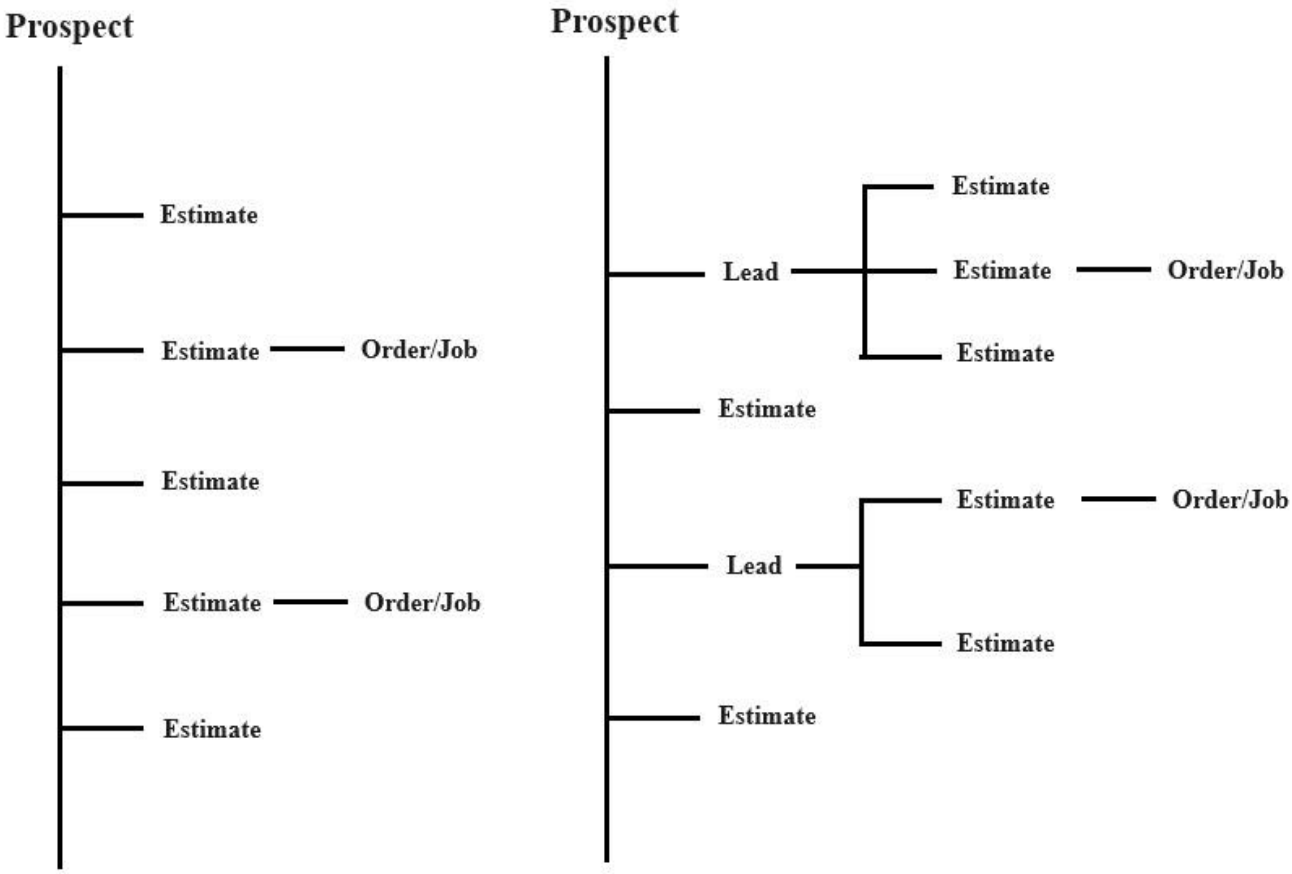
The relationship between leads, estimates and orders/jobs is like this:



On the lefthand side, we have a prospect that is not using leads. It just contains standalone estimates. And that's fine where the requirements are modest. On the righthand side we have a prospect that has some standalone estimates, and some leads which are being used to group some estimates together. In both cases, a couple of the estimates have been approved by the customer and turned into an order/job. The process of managing this is discussed in the "ESTIMATES and LEADS" section further on.

Alternative Contact

This refers to methods of contacting the prospect organization other than by telephone or email (although they are also listed here as possible contact methods), such as Facebook, Messenger, Skype, etc.

Notes

This section allows you to enter any notes about the prospect, These notes are not output in any documents that may be seen by the prospect, they are for internal use only.

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ESTIMATES and LEADS

In Adminsoft Accounts there are now three types of estimate available. The first type is available from the A/c Receivable (Sales Ledger) module. It resembles a sales invoice, and in fact can be converted directly into a sales invoice should your customer place an order. In Sales Prospecting, estimates can be created from the prospect details window (covered above). There are type types of estimate available. One is designed where there are only a few products, and only single quantities for each product are required. The other type is specifically designed for handling multiple quantities, for example, if you sell widgets, and you customer requests prices for 100, 200 and 500 (say). It can handle any number of products, and each one can be priced for up to 5 different quantities. Both types of estimate can handle images, which will then appear in the estimate that's output as print/PDF or HTML (the estimate available in A/c Receivable (Sales Ledger) cannot output images). Estimates created in Sales Prospecting are not available to view in A/c Receivable (Sales Ledger), and estimates produced in A/c Receivable (Sales Ledger) are not available in the Sales Prospecting module (though if an estimate turns into an order/job, that will be available in A/c Receivable (Sales Ledger) because an order/job always has to be associated with a customer account).

When a sales lead comes in, you may generate one or more estimate for that lead. So, in Sales Prospecting you can create a lead, and generate estimates from within the lead. This keeps them all together. You can create a lead and add any existing estimates to it if you wish. You can also output all estimates in a lead in one go, if you wish. There is a limitation in that all the estimates in a lead must be of the same type. ie. single product/quantity or multiple product/quantity. If the estimates are multi-product/quantity they cannot all be output in one go due to the complexity of the estimates.

To create an estimate, you first need to select a prospect. You can do this using the 'Prospect Details' option in the Sales Prospecting menu. At this point, you can either click the 'Leads' tab, which will display a list of any existing leads, so you can select an existing lead, or click the '**New**' button to create a new lead. Leads will be discussed shortly.

The other option is to click the 'Estimates' tab, and in there you will see a list of any existing estimates. On the righthand side of the list there is a button '**New - Multi'** for creating a multi-product/quantity estimate, and '**New – Single**' for creating the simpler sing product/quantity estimate.

In the next image, I've clicked the '**New**' button new to the list of leads in order to create a new lead:

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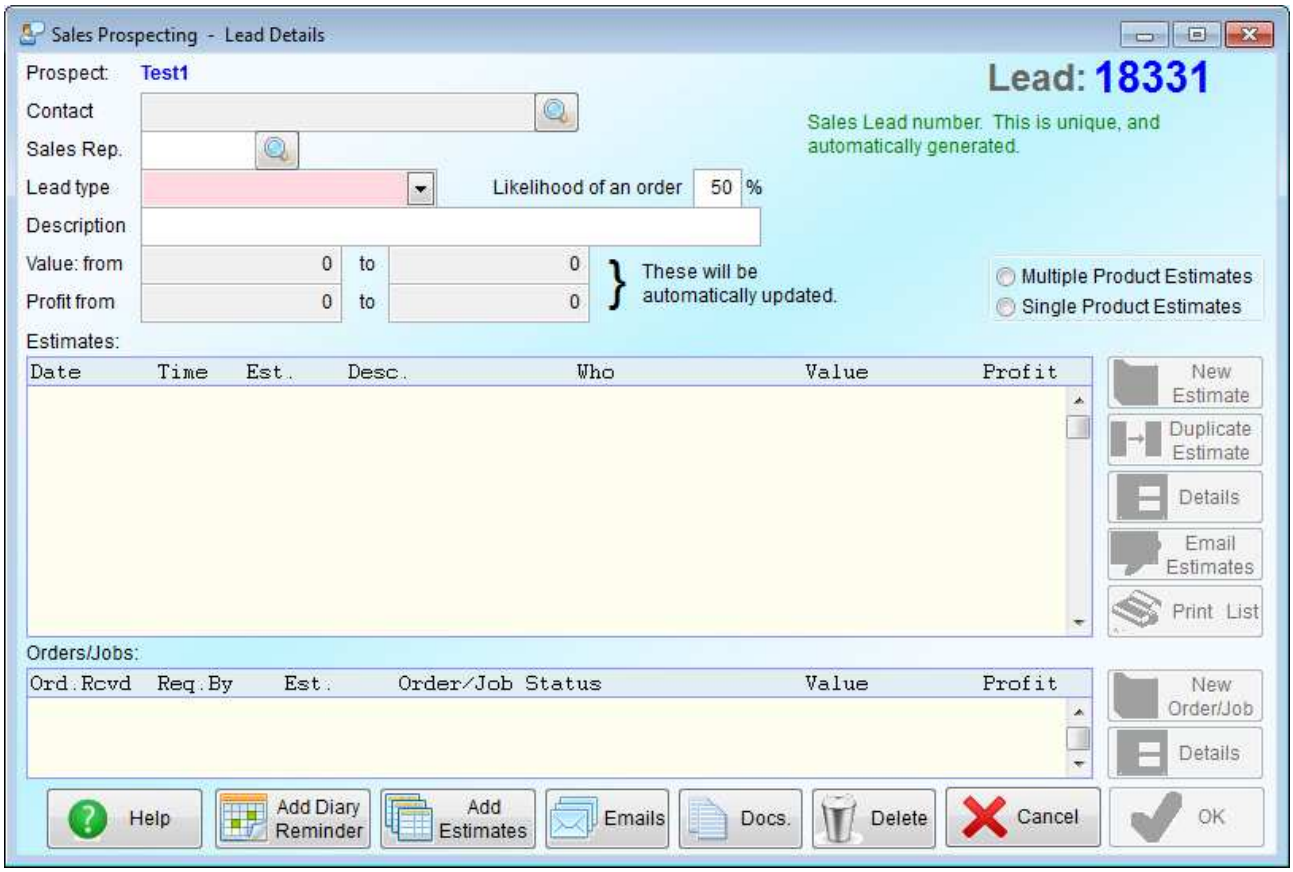


You will notice the list for estimates is much larger than the list for orders/jobs. If you make the window higher (by dragging the top and/or bottom edges), both windows will expand, but the estimate list will expand a lot more. You can control this by clicking into the column header bar above a list. A small red square will appear on the righthand side of the header. When the window is resized, the selected list will change size, but the other list will remain at its current size. This is useful for increasing the size of the orders/jobs list when necessary. To stop this behaviour, simply click into the column header bar again, the red square should vanish. Quite a few windows which have double lists – one on top of the other – can be controlled in this way.

'**Contact**' refers to a contact held in the prospect record. It's optional. You can't enter contact details here, the contact must already exist. To select one, click the find button to the right of the field.

'**Sales Rep.**' Is the employee ID (often just the persons initials) of the sales person who will be handling this lead. You can type in their ID, or click the find button to the righthand side of the input field. This input is optional.

'**Lead type'** allows you to specify what type of lead this is. A valid lead type has to be selected (you will notice the background is light red in the above picture). The lead types are user defined, and are based on the order/job types (the option to set these up from the top menu bar is: Setup -> Sales Prospecting and Order Processing -> Order/Job Type Codes). If for example your business is printing, and mainly only ever print books or magazines, you may want to set up two types: one for books and one for magazines. Estimates use Sales Analysis codes (as set up for the A/c Receivable (Sales Ledger) to analyse products/services in detail, so the 'type' we're discussing here only needs to be very general. You may not wish to break down by type at all and rely solely on the Sales Analysis codes, in which case you could just setup the one type called 'Any' or 'Miscellaneous' or

similar.

'**Likelihood of an order'** allows you to specify how likely you think it is that one of the estimates in this lead will turn into business. It requires a figure as a percentage, where 100% would indicate you're very confident business will be generated (a default can be set up in the settings option). It can of course be very difficult to know the likelihood of a sale, and so this input field is optional.

'**Description**' allows you to enter a brief description. If the estimate/s are all for red widgets, you could put 'Red widgets' in the description. You canter anything in there you wish, that might remind you of the nature of the lead. Something must be entered in here.

The '**Value**' and '**Profit**' fields are update automatically. Although they may look like input fields, they will not accept any manual input.

Finally, before an estimate can be created, you need to specify what type of estimates will be contained within the lead, either '**Multiple Product Estimates'** or '**Single Product Estimates'**. Once you have clicked on of these, the '**New Estimates'** button will become active.

Before we go one to discuss estimates themselves. We'll provide a little more information on 'leads'. There are two lists in lead details: one for estimates, and one for any orders/jobs created from an estimate (either from within the estimate or from the lead details window).

'**Duplicate Estimate'**. If you click on an existing estimate, this button will become active. It allows you to duplicate an existing estimate. Which can be very useful where you need to make minor changes to the product specification and/or quantity.

'**Details**'. If you click on an existing estimate, this button will become active. It will display the full details of the selected estimate.

'**Email Estimates'** allows you to send one email that contains the basic details of each estimate with in the body of the email. Please note, this option is not available when using '**Multiple Product Estimates**'.

'**Print List'** outputs a list of the estimates as displayed in the list.

'**New Order/Job**' If you click on an existing estimate, this button will become active. It allows you to create an order/job from the selected estimate. Note: once you have clicked this button, the full details of the order/job will appear, and it is not possible to cancel the order/job. So, if you raised an order/job by accident, you would have to delete it. However, an order/job cannot be created if the prospect is not linked to a customer account. Also, depending on how it's setup, the customer will be checked for any overdue existing invoices and their credit limit, and may ask for authorisation before creating the order/job.

'**Details**' will display the full details of any order/job selected.

Whatever the type of estimate used, single product/quantity or multiple product/quantity, there is only one type of order/job. If an estimate contains charges and costs for multiple products, they will appear in the order/job details.

'**Add Diary Reminder'** allows you to add reminder. This can be for anything, it will appear in

your daily diary on the appropriate date.

'**Add Estimates'** allows you to add any estimates for the prospect that are not currently part of another lead.

'**Emails**' will list all emails sent out from this lead, or any of the estimates within the lead.

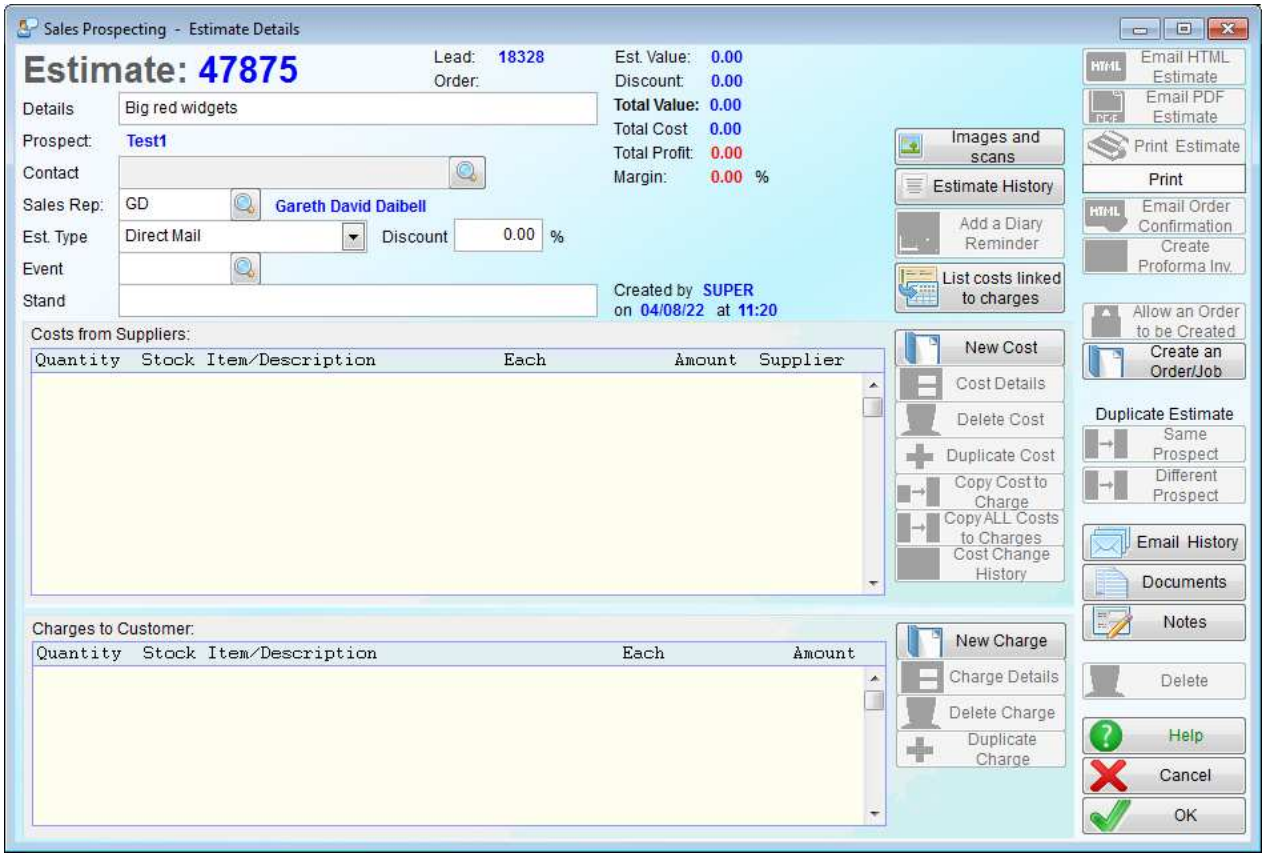
'**Docs**' allows you to add any files to the lead. These may be technical specifications, customer requirement documents, etc.

'**Delete**' allows you t delete a lead, but only if the lead hasn't timed out (in settings, you can specify how old a lead needs to be before it can no longer be edited). Any estimates and orders/jobs listed in the lead are NOT deleted. Only the lead itself is deleted.

ESTIMATES – SINGLE PRODUCT/QUANTITY

This option is for handling single product/single quantity estimates. Although you could add several products into one estimate, and then copy the estimate in order to quote for different quantities. The estimates could all then be grouped together in a lead. Though the other type of estimate specifically for multiple products and/or multiple quantities may be preferable. This single product/single quantity estimate is better for the simpler estimates.

The estimate details window when creating a new estimate looks like the following image. Estimates can be created directly from a prospect record, or like this one from a lead. As this one was created form a lead, some of the details are taken from the lead details:



As you can see, the costs of any items will be listed in the top list, and the charges to your customer in the bottom list. The estimate above has just been created, and doesn't contain any costs or charges. Often, the items in both lists will be the same (hence the '**Copy Costs to Charges**' button), but not always. They may be small differences, or they may be completely different. For example, if your business is erecting fences, you may simply quote for "10m of fencing including labor". But in the costs, you may add fence panels, posts, plinths, cement, sand, etc. You may wish to enter the costs first, so you know how much it's going to cost you to do the job. When adding a cost, it is quite possible to create an associated charge at the same time, and vice versa. Useful where charge items and cost items are similar.

The input fields with light red backgrounds need to be completed. Normally, most of that information, if not all of it, will be taken from the lead, if the estimate is created from a lead. This one was created from a lead (you can see the lead reference number 18331 near the top of the window), but I've deliberately left the input field blank so you could see what a new estimate looks like with no detail provided to it at all.

'**Details**' is expecting some brief details about the estimate. This is something to remind you what the estimate is for. Be aware: this description can appear in the estimate sent to your customer. This input field is mandatory.

'**Prospect**' is of course the name of the prospect. This will already be selected when you create the estimate and cannot be changed.

'**Contact**' is the contact name with the prospect, if it's a business or some other organization. To select a contact, click the find button at the far righthand side of the input field. This input field is optional.

'**Sales Rep.**' Requires the ID (often just the initials) of the member of staff who is responsible for this estimate (this may not necessarily be the same person creating the estimate). This input field is mandatory. I have discovered from experience, that if there is no named individual taking responsibility for something, then it often gets overlooked.

'**Est. Type**' requires you to select what type of estimate it is. This is something you can setup in the Sales Prospecting and Processing menu (you can also setup a default value in there). The same types are used for lead and for orders/jobs. It is in some ways similar to a Sales Analysis code, but whereas the Sales Analysis code works on a line-by-line basis, this 'Type' covers the whole lead, estimate or order/job.

'**Event**' This is for user define codes. In this example, user define codes have been setup to be called an '**Event**' (as in an exhibition, conference, etc.). But you can set it up to be called anything you wish. Entering anything into it is optional, but if you do enter something, it must be a valid code (as setup by you). If a description for the user defined code is not setup, it will not appear in the estimate window.

'**Stand**' This is for user defined information, which may be anything. It isn't code, it just provides a free text field. In our example, it's been setup as '**Stand**' (as in a stand at an exhibition). Entering anything into it is optional. If a description for the user defined code is not setup, it will not appear in the estimate window.

The user defined code and the user defined general input field above are also used in orders/jobs.

Any values entered here will automatically carry through to an order/job created from this estimate.

Estimates can be created directly from the prospect details, or from within a lead. If an estimate is created directly from the prospect details, it can be added into a lead at a later date, if required.

As an estimate is created from the prospect details window or a lead details window, so it knows who the prospect organization is, and displays this near the top of the estimate window. You may wish to add your main contact within the prospect organization, in which case click the find button to the righthand side of the '**Contact**' field.

Buttons

'Images and Scans' allows you to scan in any documents associated with the estimate, and also to add any image files. Note, these are for your internal use only, and do not get output as part of the estimate. Unlike estimates for multiple products/multiple quantities, you cannot add product images or product data into this type of estimate.

'Estimate History' will display an automatically generated list of events. Such as estimates created, estimates emailed, etc.

'Add a Diary Reminder' allows you to set a reminder for a particular date, perhaps to call the prospect to discuss the estimate, or chase a supplier for cost prices, etc.

'List costs linked to charges'. When a charge to the customer is created by using one of the 'copy cost' buttons, or from a cost item itself, the charge and cost are linked. Multiple costs can be linked to one charge. You use this option to see which costs are linked to which charges. These links are not that useful in the estimate. But when an order/job is created from this estimate, the charges and costs are copied over to the order/job, including any links. In an order/job, they can be very useful. The reason for this is that in an order/job, if you do anything stock related to a charge it will also update the cost (and stock/inventory control if it's a stock item). It's very useful when managing items in an order/job. Links between charges and costs don't have to be used, they are optional. But its worth getting used to creating them, as they can be very useful.

'Email HTML Estimate' will create an email, and place an HTML version of the estimate into the body of the email. It can be edited.

'Email PDF Estimate' will generate a PDF file version of the estimate, attach it to an email, and then display the email. You can edit the email, entering whatever message you wish to your customer. You can also view the PDF estimate by clicking on the 'Attachments' tab, and single righting on the attachment.

Both the email options above may have other files automatically attached to them, as setup in the option: Setup -> Miscellaneous -> Setup Email Document Attachments

'Print Estimate' will print an estimate to your default Windows printer. If you need to send it to another printer, click the output selection just below the button (this may say 'Print' by default). You can then select any file format, application, or printer you wish.

'Email Order Confirmation' will output basic details of the estimate into an email. The purpose,

of course, is to send to your customer so they can return the email with their approval.

'Create Proforma Inv' allows you to create a Proforma Invoice. If you have authorisation to create customer transactions, the Proforma Invoice will appear, allowing you to edit, print and post as usual. If you do not have authorisation, a Proforma Invoice will be automatically created and then saved to the customer account that is linked to the prospect record. If setup to do so, an email will be sent to someone who can load up the saved Proforma Invoice and send it out. If there is no customer account linked to the prospect record, this option will be greyed out.

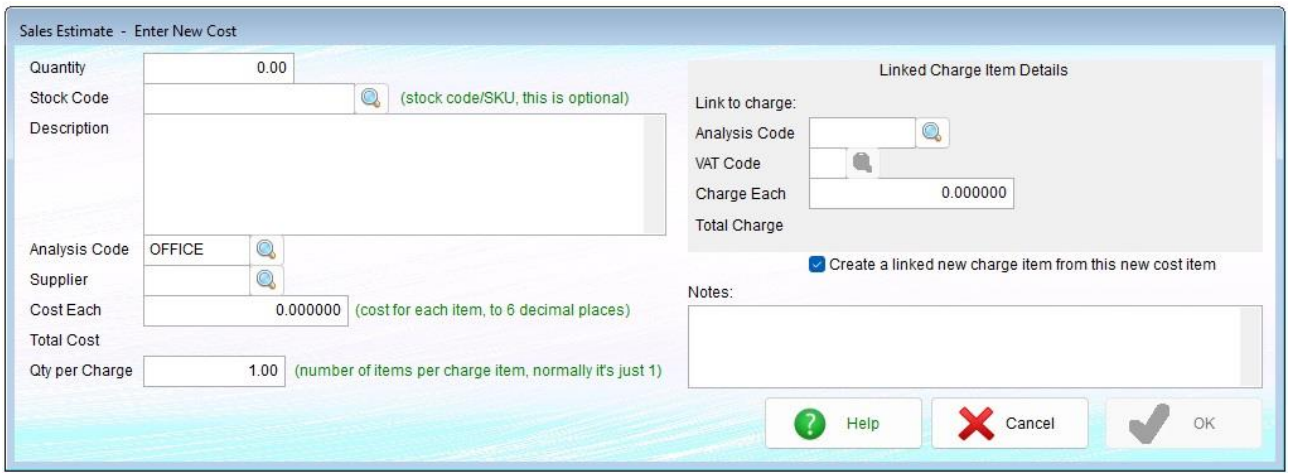
'Allow an Order to be Created' will be enabled (and the **'Create an Order/Job'** will be disabled, ie. greyed out) if there is an issue with the account the prospect record is linked to. Clicking this button will allow you to present a window to someone who has the authority to authorise an order/job to be created.

'Create an Order/Job' does exactly that. It takes all the details of this estimate and uses them to create the order/job. If this button if greyed out, you may need to click on '**Allow an Order to be Created'** discussed above.

If both the above buttons are greyed out, it may be there is no customer account linked to the prospect record, or there an issue with the account. You may see a '**Credit Warning!**' button at the top of the window. If click that, it will explain any problem with the account, and may also indicate why the above buttons are greyed out. Note, an estimate can only be used to generate one order/job. So if an order/job has already been generated, it will not allow you to create another (you would have to duplicate the estimate).

Adding a New Cost or Charge

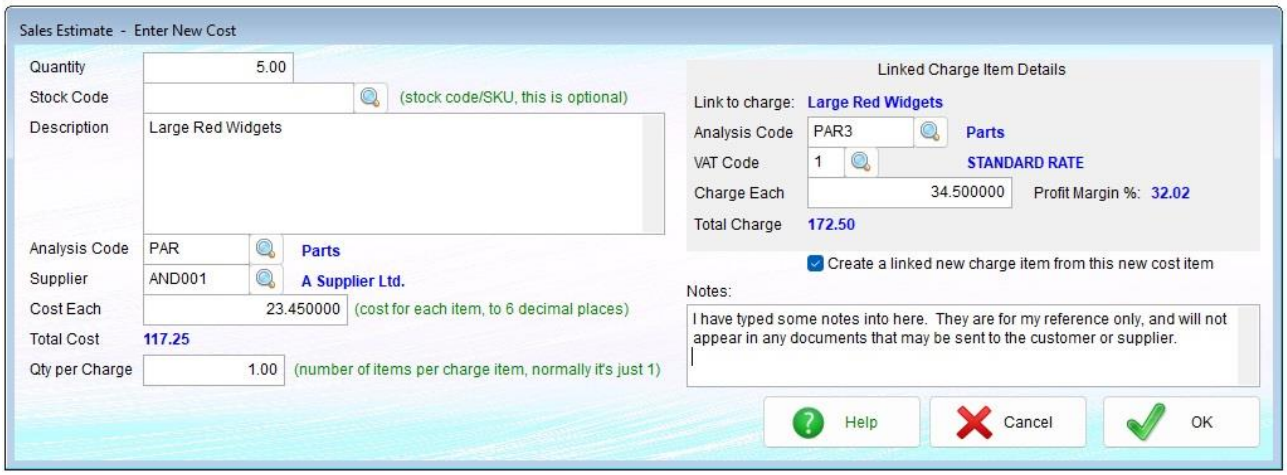
The first step in creating most estimates/quotes is to work out the cost. To add a new cost, click the '**New Cost**' button. A window will appear that looks like the next image:



All the details required for the cost item can be entered down the lefthand side. The input field '**Stock Code**' is optional. If you do enter a stock code, the contents of most fields will be automatically filled in. Though you can manually edit any of them if you wish. This includes the details on the righthand side, which is for a corresponding charge. A charge item will be automatically created if the option '**Create a linked new charge item from this new cost item**' is

selected (as it is in the above image). If the cost item is not a stock item, you will have to complete most of the input fields yourself. If you don't want to create a charge item at the same time as the cost, then click on the option '**Create a linked new charge item from this new cost item**' to unselect it (the default for this option can be changed in the Settings option). If a charge is not to be created, a button '**Add Link**' will appear. This allows you to link and existing charge to the new cost. It is optional. A charge can be linked to it later, or not at all.

Below is an image of a cost window that has been completed for a none stock item:



This new cost item, along with the associated charge item, are ready to be created. All I need to do is click the '**OK**' button. If the '**OK**' button is greyed out, it means there must be something invalid in one or more of the input fields (in which case, the background in the input field may appear as light red – to draw your attention to it).

If a charge item is created when creating a cost item, the two are linked. When you display the cost item details, you will see the charge item details on the righthand side. However, you will not be able to edit them. You can only edit a charge item by selecting the item in the '**Charges to Customer**' section, or by clicking the description of the charge item in the cost details window (this is to the righthand side of '**Link to charge:**').

You can link costs to charge, and unlink them, as many times as you wish, until you're satisfied they're correct.

There is one input field that is only used for a cost item that requires a little explanation. That is '**Qty per Charge**'. Normally, one charge item may only require one cost item. And this input field does default to 1. However, sometimes a charge item may consist of several cost items. For example, let's say you are selling food hampers, and you build up the hampers from items that you have to buy individually. If each hamper contains 2 tins of tea (among other things), and a cost item is 1 tin, then it would require 2 of those cost items for each hamper. So, you would set '**Qty per Charge**' to 2. Of course, a hamper will often be made up with lots of other things, and so if you have a hamper as a charge to the customer, it could have lots of costs linked to it. Whether you spend time do this when creating an estimate is a business decision. If a sale isn't made, that could be a waste of time. But if a sale is made, those links will be copied over to the order/job. But in an order/job, you have the same flexibility to add or remove links as you wish. So, depending on your business requirements, it may be better to wait until an estimate turns into an order/job before worrying about set up links between costs and charges.

Adding a new charge works much the same way as adding a cost. So, I won't go into detail here. But there is one difference with charges. Once created, if you then view the charge details, on the righthand side of the window there will not be the details of any cost that was created at the same time, but a list of all costs that are linked to the charge. Costs can be added or removed from that list.

Duplicate Estimate buttons:

'Same Prospect' will duplicate the estimate for the current prospect. If the estimate if part of a lead, the duplicated estimate will appear in the lead.

'Different Prospect' allows you to copy the estimate to a different prospect. It the estimate being copied is in a lead, the new estimate will not be part of a lead.
'Email History' will list all emails sent in respect of this estimate. This will be estimates (HTML or PDF) and Order Confirmations.

'Documents' allows you to add any relevant documents to the estimate. These may be things like requests to quote or technical requirement documents, etc. received from your customer.

'Notes' allows you to enter notes to the estimate. These can be anything you like, and are for your internal use only. They do not get output as part of an estimate.

'Delete' allows you to delete an estimate. You will not be able to delete if an estimate has been output in anyway (it will assume the estimate may have been sent to the customer).

'Cancel' will ignore any edits made to the estimate details and exit the estimate window. However, any changes made to '**Costs from Suppliers'** or '**Charges to Customer'** will remain.

This estimate window can be dragged deeper. Both the '**Costs from Supplier's** and '**Charges to Customer'** lists will get taller as the window gets taller, and vice versa. If you want only one list to change size, single left click into the header of the list. A small red block will appear in the righthand side of the header to indicate it's been selected. Click into the header again to de-select it.

ESTIMATES – MULTIPLE PRODUCT/QUANTITY

This type of estimate is specifically for handling situations where you are estimating for multiple products, and/or multiple quantities. When creating a new estimate, it looks like the next image:

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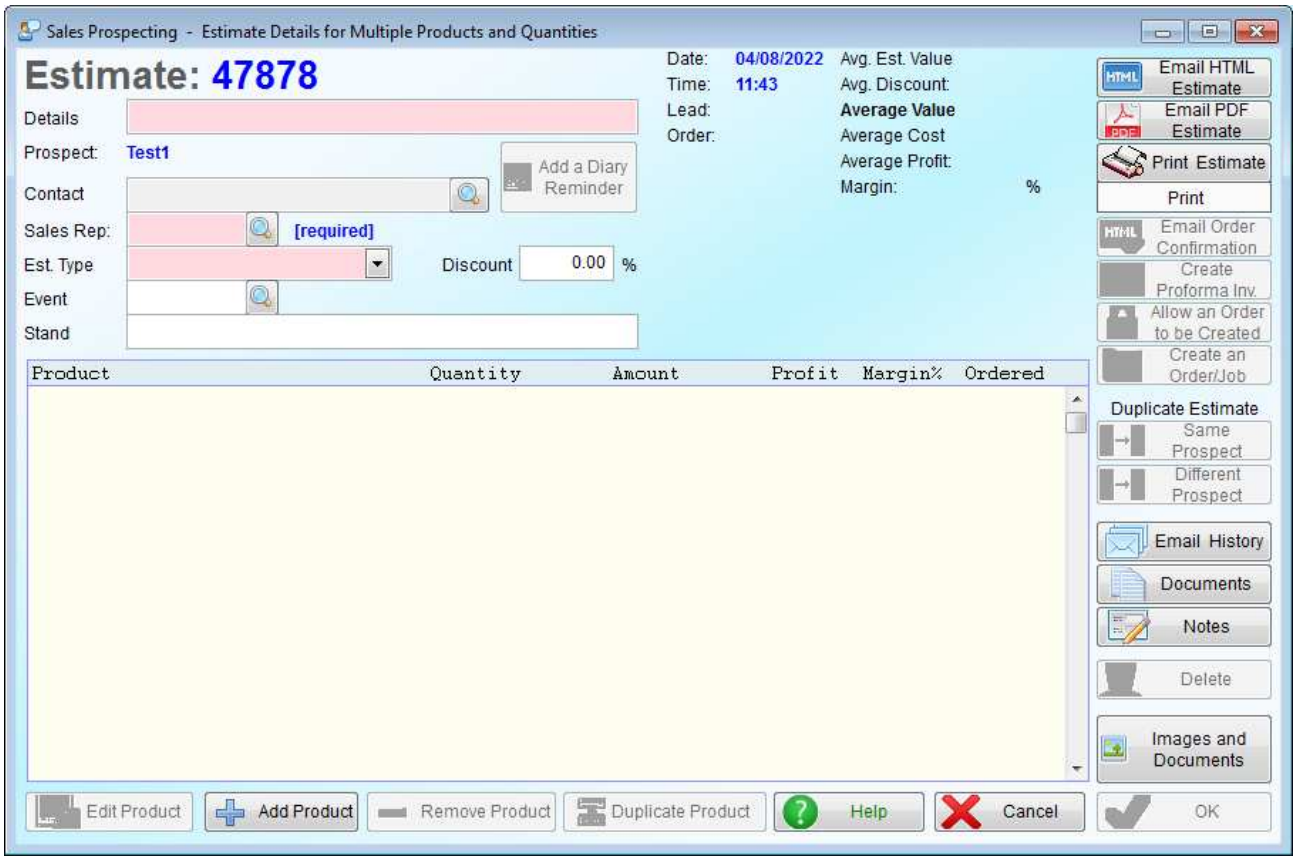

When created from a lead, some of the details in the lead will be copied over to the estimate. In this case, the estimate was created directly from the prospect record, and so no input field have been pre-filled in. Those input fields with a light red background require some input, they are mandatory.

As you can see, it looks quite different to the single product/quantity type of estimate. The approach is rather different. In this estimate you can add as many products as you wish, and up to 5 quantities/prices for each product. This window just lists the products that would be charged to your customer, you have to select a product (a new window opens up) in order to see the costs.

'**Details**' is expecting some brief details about the estimate. This is something to remind you what the estimate is for. Be aware: this description can appear in the estimate sent to your customer. This input field is mandatory.

'**Prospect**' is of course the name of the prospect. This will already be selected when you create the estimate and cannot be changed.

'**Contact**' is the contact name with the prospect, if it's a business or some other organization. To select a contact, click the find button at the far right hand side of the input field. This input field is optional.

'**Sales Rep.**' Requires the ID (often just the initials) of the member of staff who is responsible for this estimate (this may not necessarily be the same person creating the estimate). This input field is mandatory. I have discovered from experience, that if there is no named individual taking responsibility for something, then it often gets overlooked.

'**Est. Type**' requires you to select what type of estimate it is. This is something you can setup in the

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Sales Prospecting and Processing menu (you can also setup a default value in there). The same types are used for lead and for orders/jobs. It is in some ways similar to a Sales Analysis code, but whereas the Sales Analysis code works on a line by line basis, this 'Type' covers the whole lead, estimate or order/job.

'**Event**' This is for user define codes. In this example, user define codes have been setup to be called an '**Event**' (as in an exhibition, conference, etc.). But you can set it up to be called anything you wish. Entering anything into it is optional, but if you do enter something, it must be a valid code (as setup by you). If a description for the user defined code is not setup, it will not appear in the estimate window.

'**Stand**' This is for user defined information, which may be anything. It isn't code, it just provides a free text field. In our example, it's been setup as '**Stand**' (as in a stand at an exhibition). Entering anything into it is optional. If a description for the user defined code is not setup, it will not appear in the estimate window.

Both the user defined code and the user define general input field discussed above are also used in orders/Jobs. Any values entered here will automatically carry through to any order/job created from this estimate.

Estimates can be created directly from the prospect details, or from within a lead. If an estimate is created directly from the prospect details, it can be added into a lead at a later date, if required.

Buttons

'Add a Diary Reminder' allows you to set a reminder for a particular date, perhaps to call the prospect to discuss the estimate, or chase a supplier for cost prices, etc.

'Email HTML Estimate' will create an email, and place an HTML version of the estimate into the body of the email. It can be edited.

'Email PDF Estimate' will generate a PDF file version of the estimate, attach it to an email, and then display the email. You can edit the email, entering whatever message you wish to your customer. You can also view the PDF estimate by clicking on the 'Attachments' tab, and single righting on the attachment.

Both the email options above may have other files automatically attached to them, as setup in the option: Setup -> Miscellaneous -> Setup Email Document Attachments. Files can also be attached (or removed) when editing the email.

'Print Estimate' will print an estimate to your default Windows printer. If you need to send it to another printer, click the output selection just below the button (this may say '**Print**' by default). You can then select any file format, application, or printer you wish.

'Email Order Confirmation' will output basic details of the estimate into an email. The purpose, of course, is to send to your customer so they can return the email with their approval.

'Create Proforma Inv' allows you to create a Proforma Invoice. If you have authorisation to create customer transactions, the Proforma Invoice will appear, allowing you to edit, print and post

as usual. If you do not have authorisation, a Proforma Invoice will be automatically created and then saved to the customer account that is linked to the prospect record. If setup to do so, an email will be sent to someone who can load up the saved Proforma Invoice and send it out. If there is no customer account linked to the prospect record, this option will be greyed out.

'Allow an Order to be Created' will be enabled (and the '**Create an Order/Job'** will be disabled, i.e. greyed out) if there is an issue with the account the prospect record is linked to. Clicking this button will allow you to present a window to someone who has the authority to authorise an order/job to be created. Note: unlike the single product/quantity type estimate, one or more products have to be selected as 'Ordered' (via the '**Edit Product'** option) before an order/job can be created.

'Create an Order/Job' does exactly that. It takes all the details of this estimate and uses them to create the order/job. If this button if greyed out, you may need to click on '**Allow an Order to be Created'** discussed above. If both buttons are greyed out, it may be there is no customer account linked to the prospect record, or no products have been selected for the order.

'Email History' will list all emails sent in respect of this estimate. This will be estimates (HTML or PDF) and Order Confirmations.

'Documents' allows you to add any relevant documents to the estimate. These may be things like requests to quote or technical requirement documents, etc. received from your customer. The idea is for it to handle all types of files except images, but in practice you can also handle images in here too should you wish to.

'Notes' allows you to enter notes to the estimate. These can be anything you like, and are for your internal use only. They do not get output as part of an estimate.

'Delete' allows you to delete an estimate. You will not be able to delete if an estimate has been output in anyway (it will assume the estimate may have been sent to the customer).

'Images and Documents' allows you to scan in any documents associated with the estimate, and also to add any image files. Note, these are for your internal use only, and do not get output as part of the estimate. To add images that you want to appear in an estimate, use the '**Edit Product'** button. Images that appear in an estimate are always associated with a particular product (they will appear next to in the Print/PDF estimate layout). The difference between this button and the '**Documents'** button, is the '**Documents'** button manages documents that are in Word, Write, PDF, etc. format. In other words, any file that is not an image (that's the intention, although in practice it can also handle existing image files).

'Cancel' will ignore any edits made to the estimate details and exit the estimate window. However, any changes made to things like products, images, etc. will remain.

Duplicate Estimate buttons:

'Same Prospect' will duplicate the estimate for the current prospect. If the estimate if part of a lead, the duplicated estimate will appear in the lead.

'Different Prospect' allows you to copy the estimate to a different prospect. It the estimate being copied is in a lead, the new estimate will not be part of a lead.

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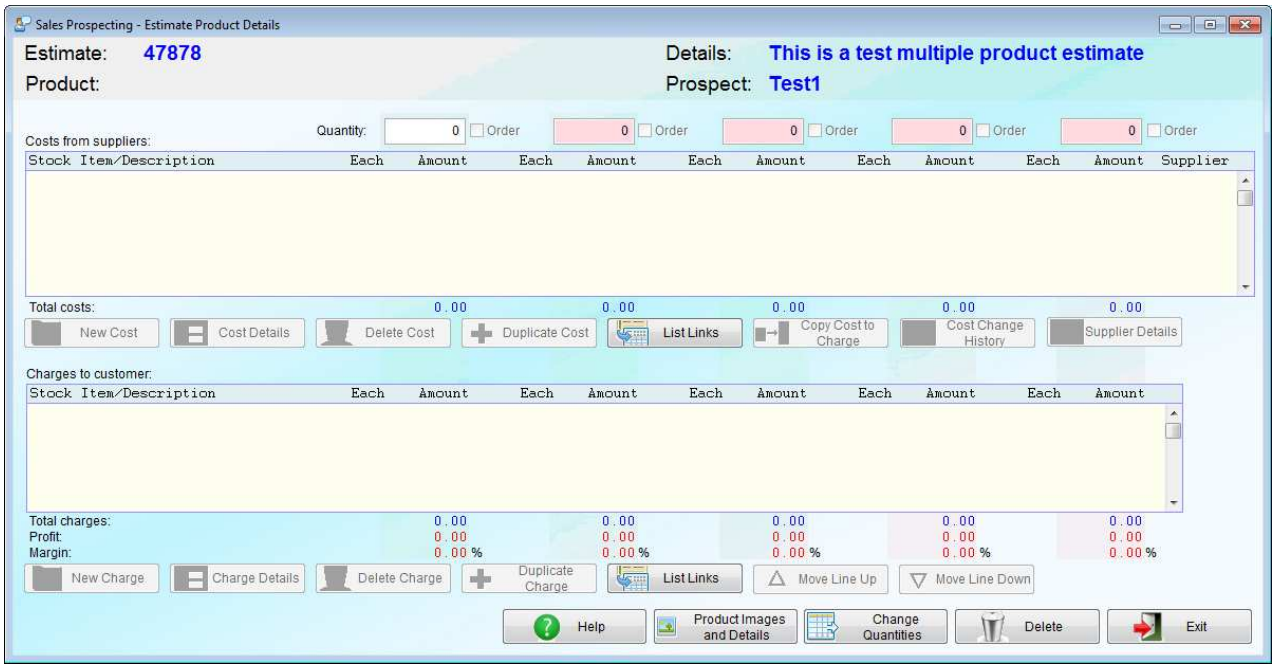
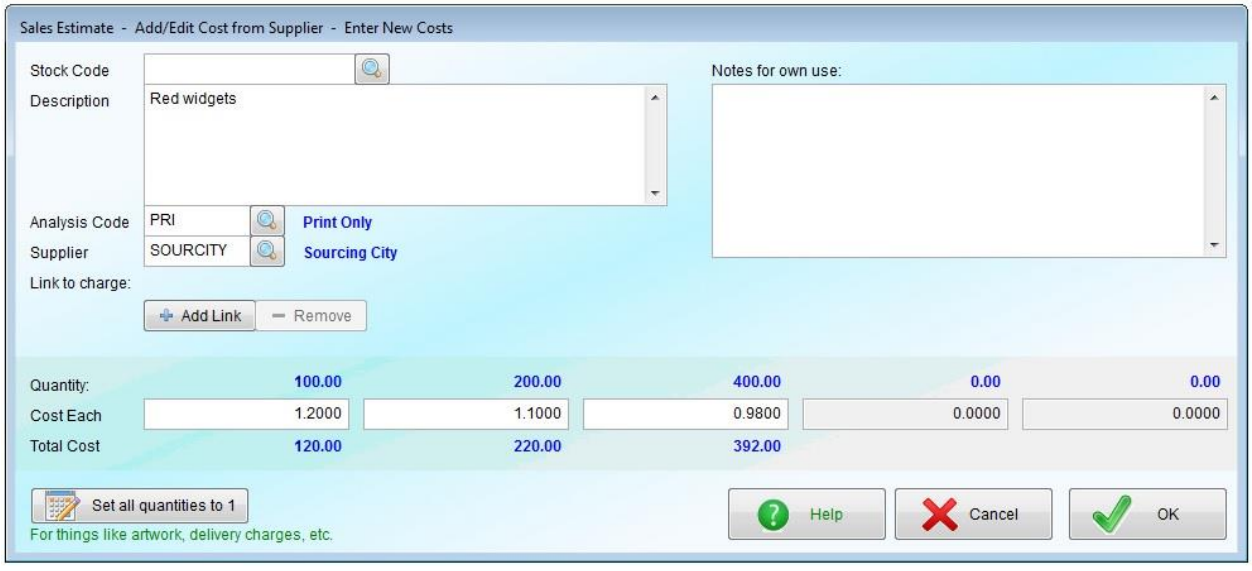
New Estimate:

So, in a new estimate, after entering information into those fields where it's mandatory, then next thing to do is to enter one or more products. Clicking on the '**Add Product'** button will bring up this window:



The window to add product/s is quite wide. Most options within Adminsoft Accounts can operate within a width of 800 pixels, so the software will run on just about any monitor, or on a large monitor set to a low resolution in order to display larger text for the visually challenged. Unfortunately, at around 1,200 pixels wide. this window isn't one of them. The width is necessary to accommodate five columns, each column representing a different quantity.

We can start in this window by setting out the required quantities for estimating the product, in this case I'll select 100, 200 and 400. Next, I click the button **New Cost** to add a cost item, this may be a stock item, or something that is not carried in stock.



In the last example (previous image), I've entered a none stock item, simply by ignoring the '**Stock Code**' input field, and typing straight into the '**Description**' field. I selected a Sales Analysis code in the '**Analysis Code**' field, as that is mandatory. I also selected a supplier. Although this is not mandatory, it may be advisable to select a supplier, partly so people looking at the estimate know where the cost came from, and partly because if this product is ordered, all this information goes through into the order/job details (a supplier will be required in order to generate a P/O). I've also entered a unit cost price (i.e. per item) into each of the first three '**Cost Each**' input fields. i.e. one cost for each quantity.

The '**Notes for own use**' input field can have anything entered into it. These notes will not appear in any documents you may send out to your customer.

The quantities cannot be changed from this window. This is to ensure all costs and charges to the customer are all estimated based on the same quantity in that column. However, in most estimates there is often an item that is a one off, such as a charge for carriage, delivery, a setup fee, etc. So, in the cost details window (and in the charges detail window) there is a button '**Set all quantities to 1'** that does exactly that, for that particular cost/charge. If you need it, although the cost may be the same regardless of quantity, you still need to enter the cost for each quantity. In practice, depending on what it is, sometimes the cost will change depending on the quantity. For example, delivery may be more expensive for larger amount of product.

The **'Add Link'** button, will display a list of charges to the customer for this product/item, allowing you to select one to link to the cost being created. As I haven't added any charges yet, if I clicked the button, the window would of course be empty. Just as with the single product type of estimate, if any costs are copied into the charges section, then the cost and charge become automatically linked. Note: only one cost can be linked to a charge. You cannot have multiple costs linked to one charge, or vice versa. Linking costs to charges is optional.

The **'Remove'** button will remove a link between the cost and a charge. As this cost is just being added, there is no link, and so the button is greyed out. It only removes the link, it does not delete the cost or any charge it may be linked to.

Anyway, back in the product details window:

'Cost Details' will be enabled when you select a cost item. You can edit anything regarding the item, except the quantities. Note: if the quantities do need to change for a product, there is the '**Change Quantities'** button at the bottom of the window.

Once the costs are added, you may then want to enter the charges to the customer. There is a button in the costs section: '**Copy Cost to Charge'** which will be enabled when a cost is selected. When clicked, it will bring up a window that requires you to enter a Sales Analysis code and a Sales Tax/VAT code. It will also apply a default profit to each cost (setup in the Sales Prospecting and Processing Settings option), you can edit the profit % if you wish. Next is an example with one item ('Red Widgets') plus cost of delivery:

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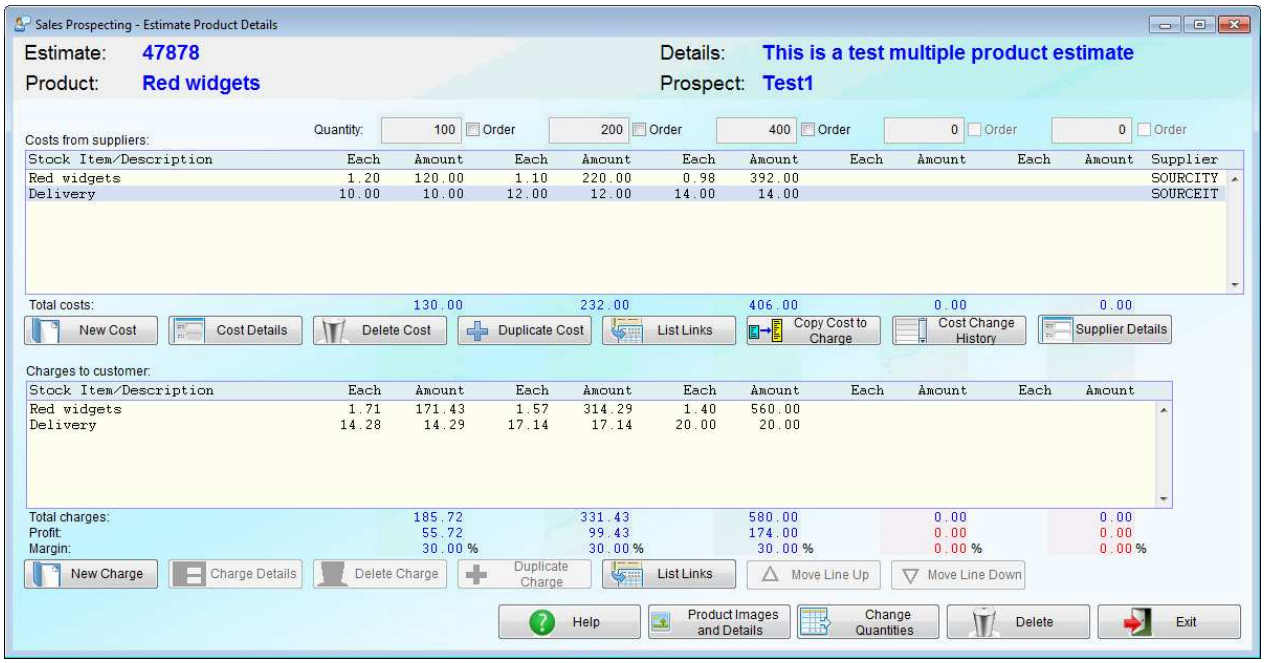

You can, of course, add as many items in there as you wish. But do bear in mind, this window is designed to handle one product. You'll notice the description of the first item in the charges to customer section has automatically been picked up and use as the product description (it's displayed in the top lefthand corner).

The **'List Links'** button appears in both the costs and charges sections. If you click the button in the costs section, it will show links from costs to charges. If you click the button in the charges section, it will show links from charges to costs. When a charge to the customer is created by using the **'Copy Cost to Charge'** button, the charge and cost are linked. When an order/job is created from this estimate, the charges and costs are copied over to the order/job, including any links. The reason for this is that in an order/job, if you do anything stock related to a cost it will also update the charge, and vice versa. It's very useful when managing items in an order/job. However, it's only really useful for businesses where the list of charges are the same or very similar to the list of costs. For example, if you sell and erect fencing, and in the charges section you list everything separately, as in: fence panels, posts, plinths, etc. This may work well for you. But if you just tend to put something like "Erection of 50ft fence", then clearly it won't. Links between charges and costs don't have to be used, they are optional.

There is one final step you may or may not wish to do, and that's adding some images and HTML formatted text. These can appear on the estimate sent to your customer. To add these, click the '**Product Images and Details**' button. The following window will appear:

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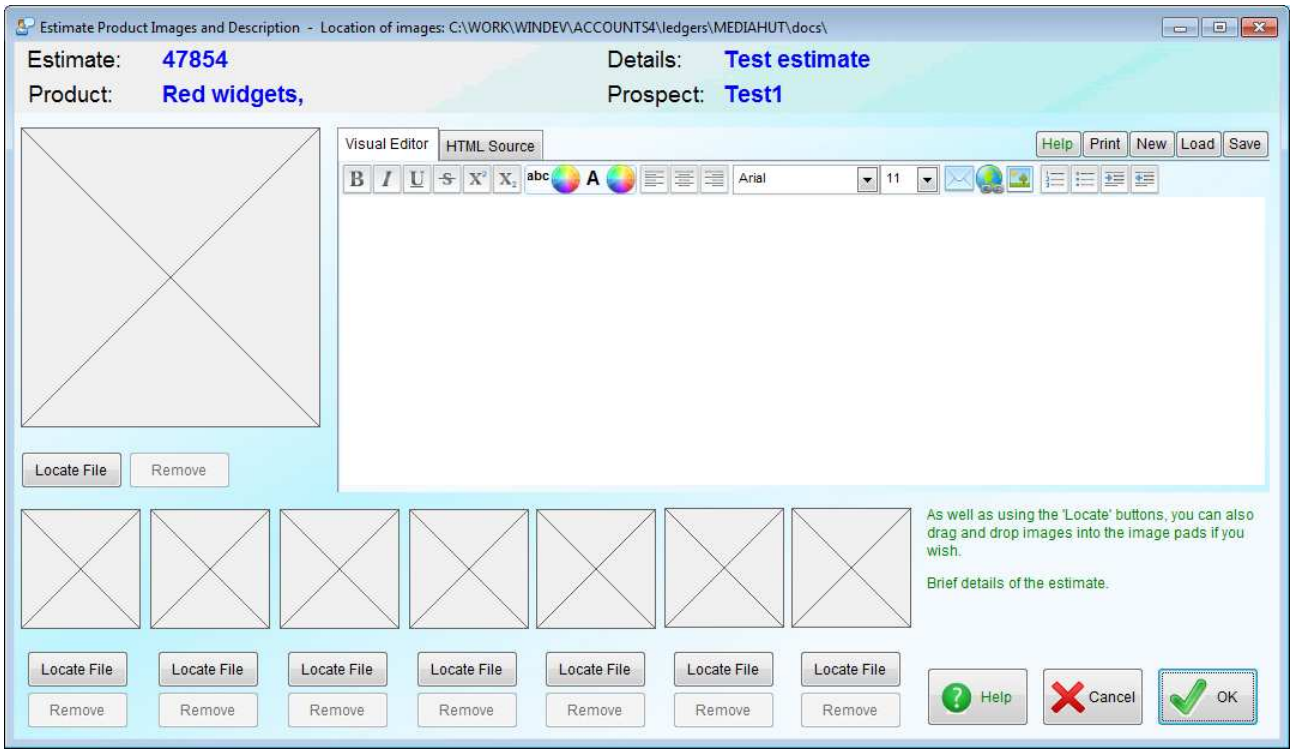

The large grey box in the top left is for the main product image. If possible, this image will always appear next to the product prices and description. To add an image, click the 'Locate File' button, or if the file is visible, you can drag it over into the box. If you are viewing the image on screen in a web browser, you can click on the image and drag it over into the box. The same applies for all the other grey image boxes. If you fill up some of the boxes with images, and then remove one or two in the middle, when saving the images, the gap will be closed up. Although the main image looks larger in this window, all images will actually be whatever size the original image is, though you can specify a standard size for images in Setup -> Sales Prospecting and Processing -> Settings

The top righthand section of this window allows you to enter HTML formatted text that can provide some basic product description. You can copy and paste text off a web page if required. What you need to be aware of, is that this description is treated differently depending on whether the estimate is output as HTML or print/PDF. If the estimate is in HTML, you can add as much text as you like, the estimate will adapt accordingly. But print/PDF output does not render HTML text. So, the way this works is when this information is saved, it literally takes a screen image of the HTML being displayed in the window and uses that. The issue with this is that if there is more text than fits inside the visible window, then it will be truncated when outputting to print/PDF type estimates (HTML based estimate layouts should be fine).

The next screen shot is of the same product image window with three images and some HTML text added:

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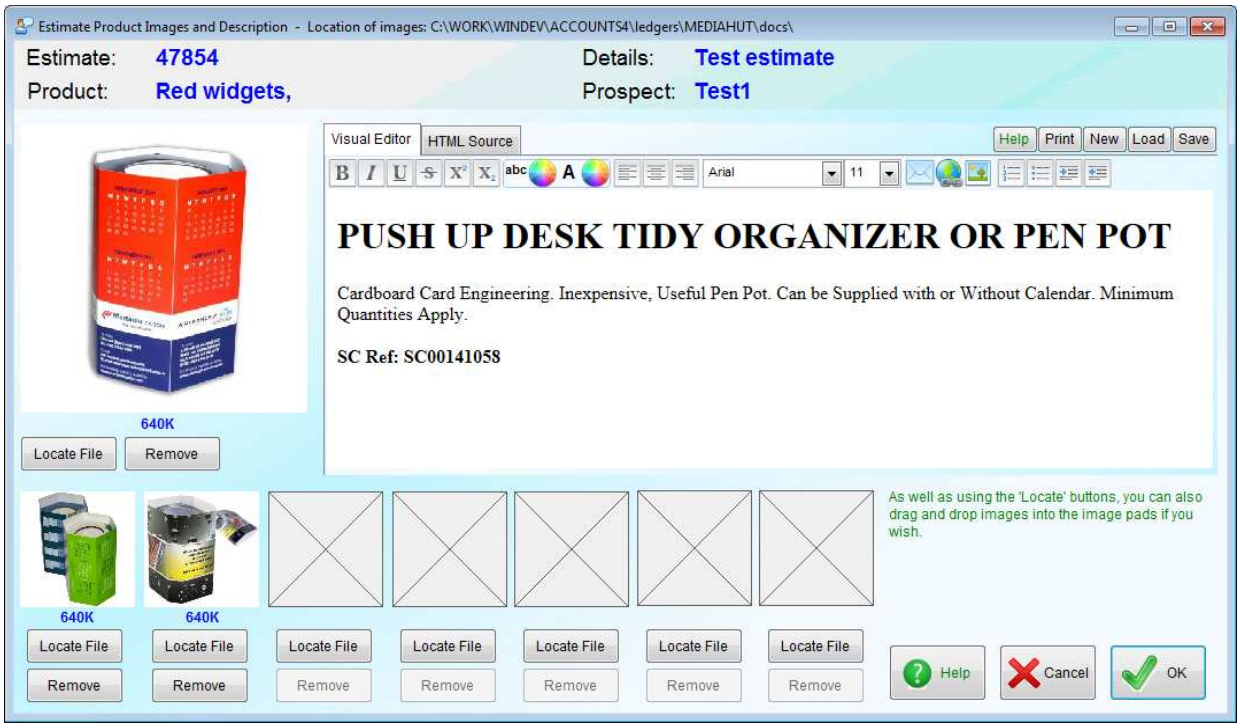
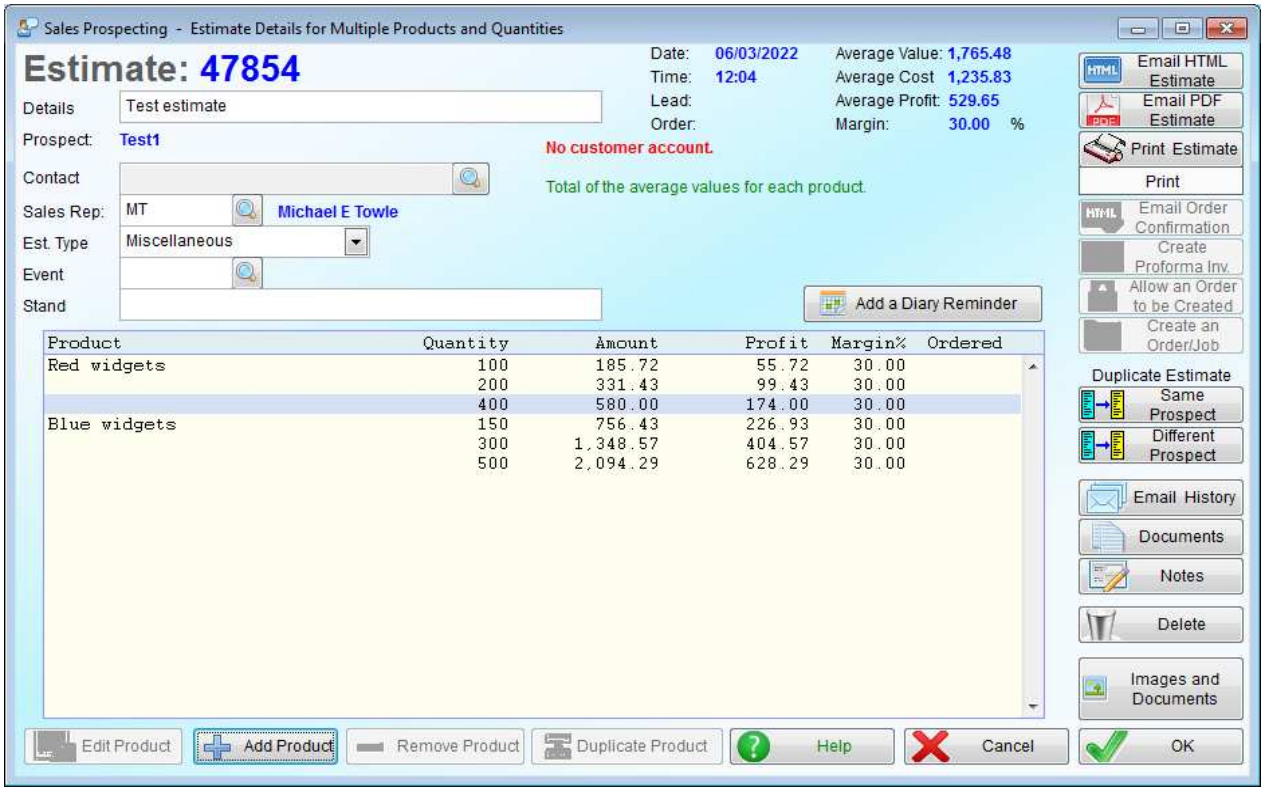


At this point we can click the '**OK**' button to save the details. These details can be edited at any time simply by clicking the '**Product Images and Details**' button in the product detail window.

I've now saved the product details and created another product I've called 'Blue widgets'. The estimate window now looks like this:



Note the product name. In this case there is Red widgets' and 'Blue widgets'. The name is taken from the first item in the charges section. So, that first line should always be the main item/service

being provided. You can change the order in which items appear in the charges section by clicking on an item and then using the '**Move Line Up**' and '**Move Line Down**' buttons to alter its position in the list.

As you can see, each product is listed, along with the quantities and the necessary pricing information. This estimate is not ready to be sent out, using one of the buttons in the top righthand corner. These have already been covered earlier on in this guide.

Note: you may have noticed the 'No customer account' message displayed in the window. At the estimating stage, this is OK. But should your customer place an order, a valid customer account will have to be associated with the prospect record before the software will allow a job to be created.

EMAIL SHOTS

There are email shot options for both customer and suppliers. The Sales Prospecting system is no different, and has an email shot option for prospects/contacts that works in much the same way. Operating these email shot options is covered in the guide for Setting up Email.

However, Sales Prospecting has another option: 'Imported Data Lists'. This option allows you to import data in form of a text or CSV file. You can setup categories in which to organize the imported data. So, this allows email shots to go out to recipients with whom you may not have had any previous contact. Please check the law in your country regarding sending out bulk email. In some countries it's illegal to send out bulk email to recipients who have not requested it or opted in in some way. When I talk about bulk email, I'm talking about lists of no more than a few hundred email addresses. This is because most likely they will be sent out using the email service provided by your Internet Service Provider or via an on-line email service, they usually do not allow the sending of bulk email. So, when setting up this facility we recommend you set the email send rate to maybe 50/hour, something of that order. Which means email shots of more than a few hundred are not really practical, unless you intend leaving your PC switched on overnight, maybe for several days, depending on how large the email shot is, and the maximum number per hour you think you can send out.

One way in which Adminsoft Accounts can get around the email send rate problem, is that it allows you to enter the details of several internet service providers and/or on-line email platforms. It can then use all of them at the same time to send out email. This is covered in detail in the 'Setting up Email' guide.

What the Sales Prospecting module has that other modules don't is the ability to import data, and then send out email shots using email addresses contained within it. In the Sales Prospecting menu, select the option 'Imported data Lists'. The window that appears will look something like this:

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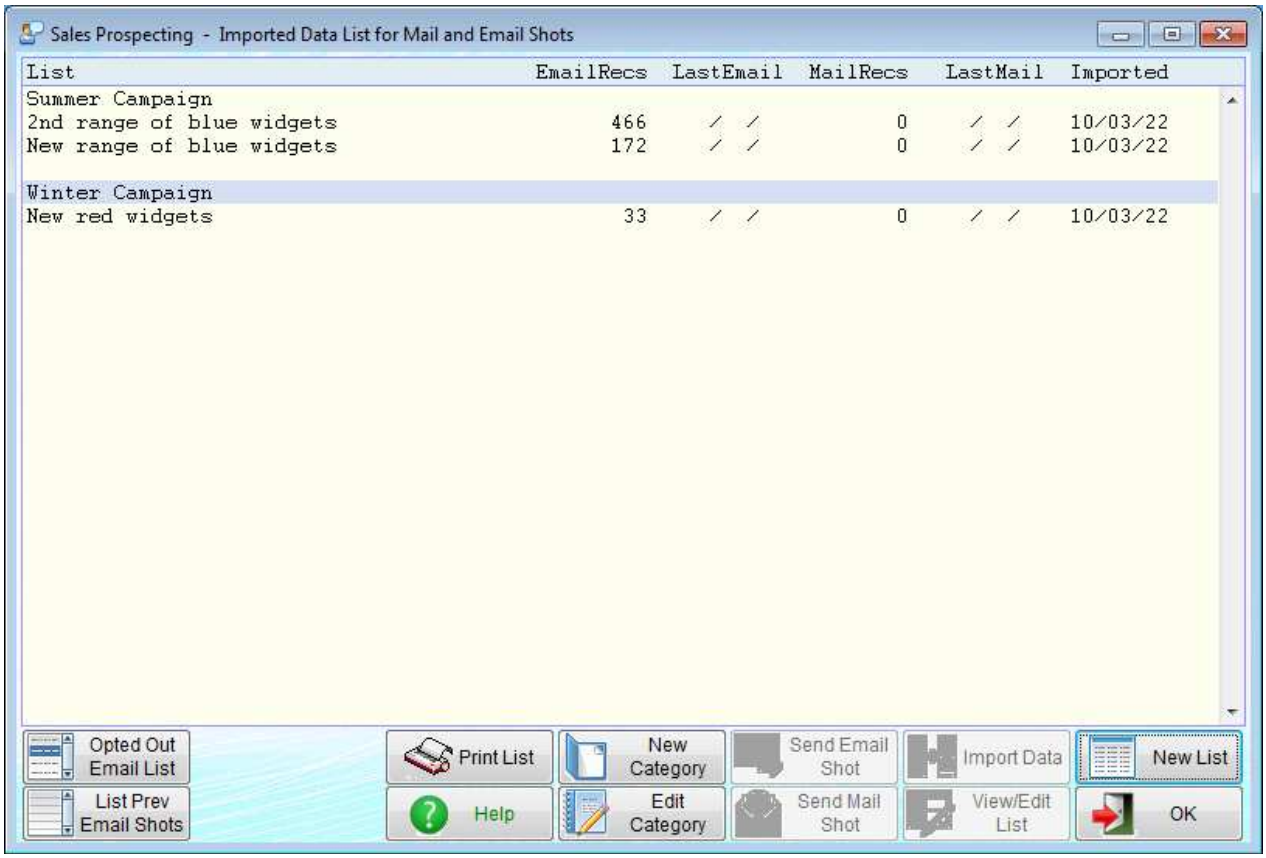
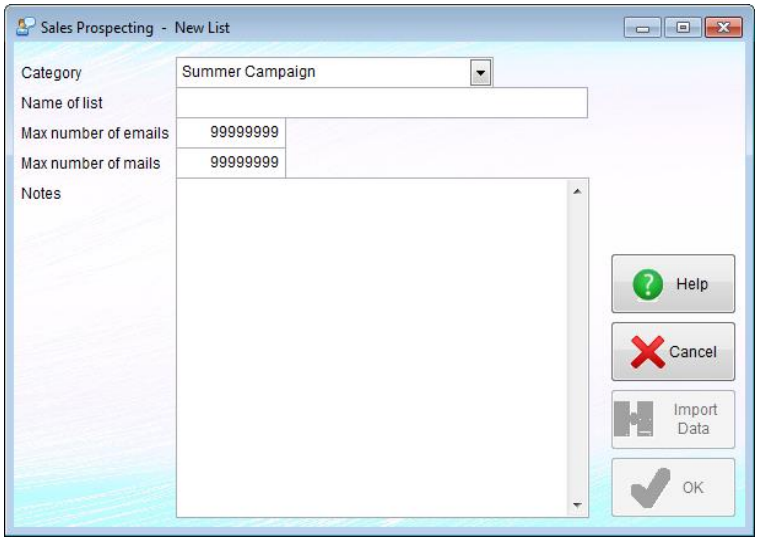


This window lists the data that has been imported. Each line may contain data from one or more imported files. Each line is referred to as a 'list', and lists always appear below a category. In the image above, we have two lists appearing under the category 'Summer Campaign', and one list under the category 'Winter Campaign'. You can create categories by clicking the '**New Category**' button. When you use this option for the first time, you will have to create at least one category. Don't worry too much about the name, the button '**Edit Category**' allows you to change the name of a category. Also, don't worry about putting a list into the wrong category, because if you edit a list you can change categories. So, nothings set in stone.

After creating a category, the next step is to create a list that can contain the data you intend to import. Click the '**New List**' button, and a window will appear allowing you to enter some basic details:



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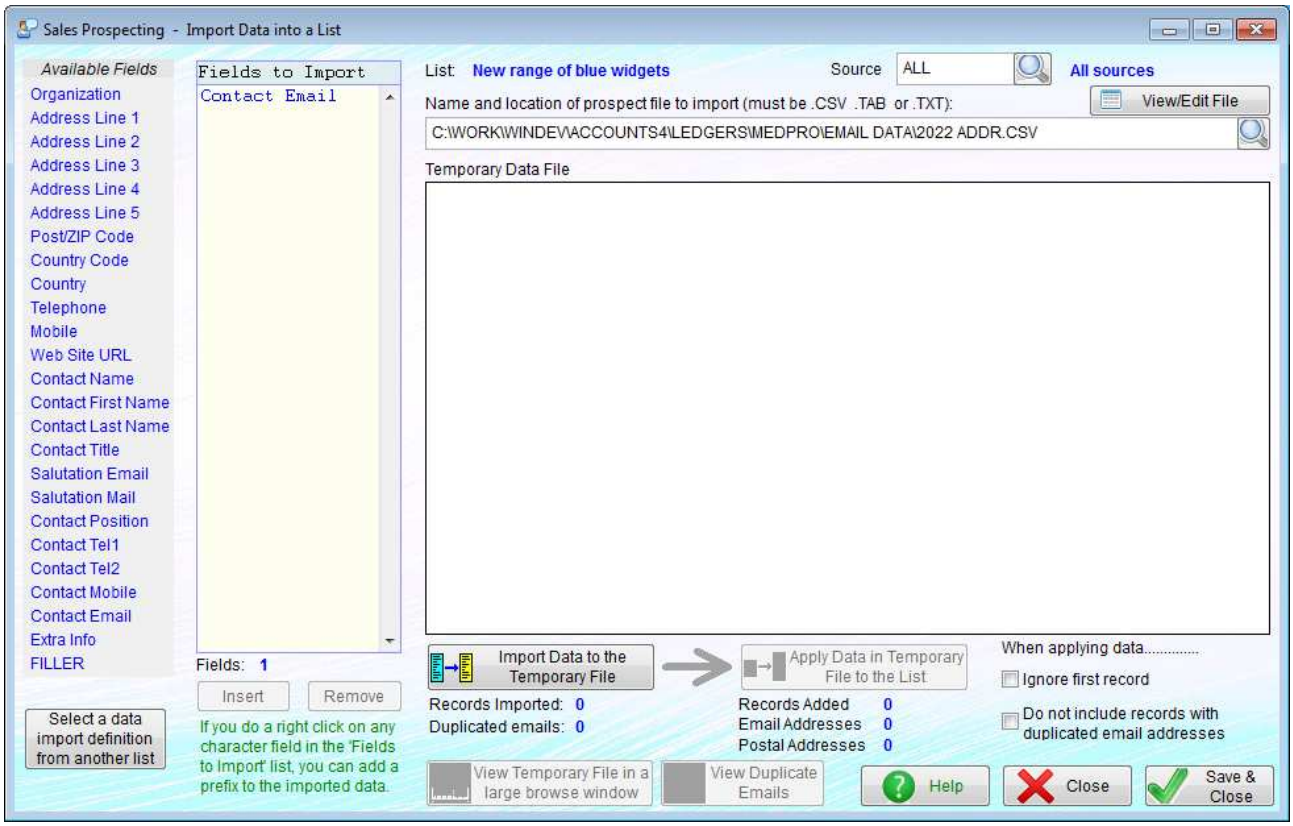
As you can see, you can select the category in the drop down input selection at the top. You need to enter a name for the list. Anything will do, it's just something to allow you to identify what data the list is likely to hold.

The '**Max number of emails**' and '**Max number of mails**' input fields allow you to set a maximum number of times the data in this list can used.

Once a name for the list has been entered, both the '**Import Data**' and '**OK**' buttons will be enabled. If you click '**OK**', the list will be created, and this window will close. But if you click '**Import Data**', then it'll save the list details and go straight to the import data window.



In the import data option, you have to set it up to receive the file. First, select the source of the file. This is where the file came from, uses the same codes the source for a sales prospect. Next it requires the file location and name. You can type this is, or use the find button on the far right of the input field, or if the file is visible in Explorer you can drag it into the input field. Once you have located the file you can click the 'View/Edit File' button which will display the data file in Windows Notepad. This allows you to see what data is in which column.

The software expects files to be in ASCII text, with a file extension of either .CSV, .TAB, or .TXT It is not necessary (in fact, it's not possible) to manually specify character string, or data record delimiters. The software should be able to work these out for you. What you do need to do is tell the software what each data field in the file is. You can single left click on any data field listed under **'Available Fields'** and it will appear in the list **'Fields to Import'**. The fields must be in exactly the same order in which they appear in each record in the file to be imported. If there is a data field in the import data file that is not required, simply click on the field '**FILLER**' in the

'**Available Fields**' list. It will know then to ignore that field. You can enter the same field more than once, but the first instance of the field will be ignored.

If you make a mistake in the '**Fields to Import**' list, you can remove a field by clicking on it and clicking the '**Remove**' button below the list. This will remove the field and close up the gap. If you need to add a field into the list between two existing fields, click on the field below where you need to add the field, and then click the '**Insert**' button below the list. A gap will then open up in the list. You can then click a field in the '**Available Fields**', and it will be placed into the gap.

If you have imported data from a similar file before, instead of setting up the fields again, you can click the button '**Select a data import definition from another list**' which will display other lists. When you select one, the data import definition used for that list will be loaded up. Potentially, it could save you some time.

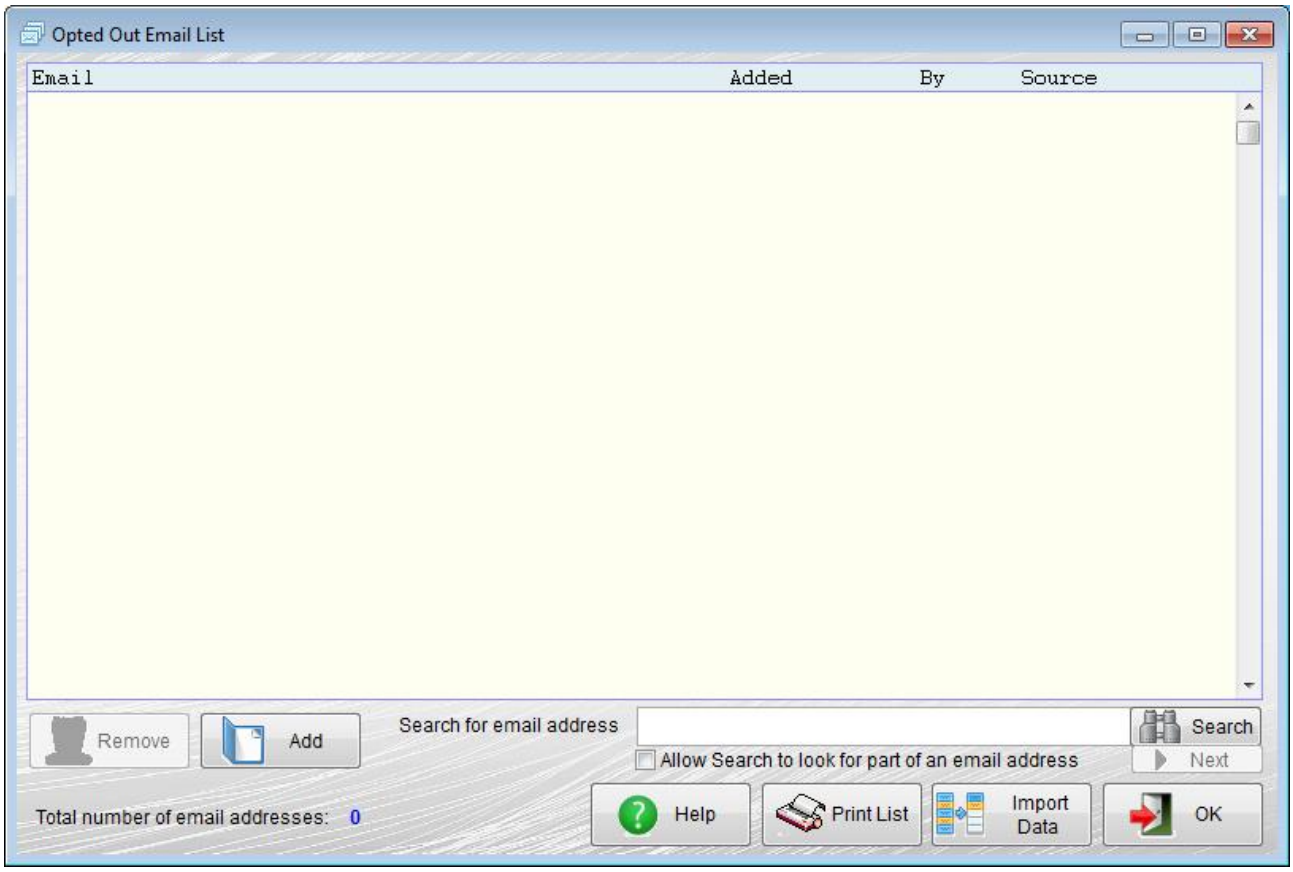
Once you're happy everything is setup correctly, you can click the '**Import Data to the Temporary File**' button. This will load the data into a holding file. This gives you the opportunity to check it over before importing it fully. You'll be able to see the data appear in the list above the button, or you can click the '**View Temporary File in a large browse window**' to get a better look at it. The window that appears can be made to fill the screen. If you're not happy with the data in the temporary file, you can adjust the fields in '**Fields to Import**' as necessary, then click the '**Import Data to the Temporary File**' button again. You can click the '**Save & Close**' button to save the work you have done describing the import file, without actually importing it. Which can be useful if you're struggling to get it right, and perhaps need to get back to it at a later date. If you just click the '**Close**' button, the definitions you set up or any editing in '**Fields to Import**' will be lost.

Once you're satisfied the data held in the temporary file is correct, you can click the '**Apply Data in Temporary File to the List**' button to read in the imported data into the data list.

Once back in the 'Imported Data List for Mail and Email Shots' option, you can select the same list if you wish, and then click the '**Import Data**' to import more data into it. The software will detect any duplicate emails, and will not import them (in the data import option, you'll notice it reports '**Duplicate emails**').

One very important aspect when sending out email shots is to ensure the recipients actually want to receive your email. We strongly recommend you provide some method whereby a recipient can opt out of receiving any future email (perhaps making use of #email# in the HTML body of the email). Also, if you receive any bounces (emails that cannot be delivered), you may want to mark those emails to ensure you don't send to them in the future. To handle this, Adminsoft Accounts has an opt out option. In the 'Imported Data List for Mail and Email Shots' option, click the '**Opted Out Email List**' button. The window will look like the following image:

Adminsoft Accounts - Sales Prospecting



In this screen image, no email addresses have been added yet. You can add them manually, using the '**Add**' button, or you can import them from a text file by clicking '**Import Data**'. The data import option is much simpler than for regular data lists. Any file should just contain email addresses and nothing else.

All email shot options, including those in the ledgers for customers and suppliers will check this list before sending out an email (even if '**Ignore Contact Email Shot Setting**' is set to '**Y**', as that just refers to the setting in the contact record). When sending out individual emails, the recipients address is NOT checked against the opt out list.

End of Document